

For the year Jan. 1-Dec. 31, 2012, or other tax year beginning

, 2012, ending

, 20

See separate instructions.

Your first name and initial

BARACK H.

Last name

OBAMA

Your social security number

If a joint return, spouse's first name and initial

MICHELLE L.

Last name

OBAMA

Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions.

1600 PENNSYLVANIA AVENUE, NW

Apt. no.

▲ Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below.

WASHINGTON, DC 20500

Presidential Election Campaign  
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

Foreign country name

Foreign province/state/county

Foreign postal code

☒ You ☒ Spouse

## Filing Status

1 ☐ Single2 ☒ Married filing jointly (even if only one had income)3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶4 ☐ Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter this child's name here. ▶5 ☐ Qualifying widow(er) with dependent child

Check only one box.

## Exemptions

6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6ab ☒ Spouse

c Dependents:

(1) First name

Last name

(2) Dependent's social security number

(3) Dependent's relationship to you

(4) ☒ If child under age 17 qualifying for child tax credit

MALIA A OBAMA

DAUGHTER

Boxes checked on 6a and 6b

No. of children on 6c who:

• lived with you

• did not live with you due to divorce or separation (see instructions)

Dependents on 6c not entered above

Add numbers on lines above ▶

If more than four dependents, see instructions and check here ▶ ☐

d Total number of exemptions claimed

## Income

7 Wages, salaries, tips, etc. Attach Form(s) W-2

7

394,840.

8a Taxable interest. Attach Schedule 8 if required

8a

11,462.

b Tax-exempt interest. Do not include on line 8a

8b

9a Ordinary dividends. Attach Schedule 8 if required

9a

2.

b Qualified dividends

9b

10 Taxable refunds, credits, or offsets of state and local income taxes

10

11 Alimony received

11

12 Business income or (loss). Attach Schedule C or C-EZ

12

258,772.

13 Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐

13

-3,000.

14 Other gains or (losses). Attach Form 4797

14

15a IRA distributions

15a

b Taxable amount

15b

16a Pensions and annuities

16a

b Taxable amount

16b

17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E

17

18 Farm income or (loss). Attach Schedule F

18

19 Unemployment compensation

19

20a Social security benefits

20a

b Taxable amount

20b

21 Other income. List type and amount

21

22 Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶

22

662,076.

Enclose, but do not attach, any payment. Also, please use Form 1040-V.

## Adjusted Gross Income

23 Educator expenses

23

24 Certain business expenses of reservists, performing artists, and fee-based government officials. Attach Form 2106 or 2106-EZ

24

25 Health savings account deduction. Attach Form 8889

25

26 Moving expenses. Attach Form 3903

26

27 Deductible part of self-employment tax. Attach Schedule SE

27

3,465.

28 Self-employed SEP, SIMPLE, and qualified plans

28

50,000.

29 Self-employed health insurance deduction

29

30 Penalty on early withdrawal of savings

30

31a Alimony paid b Recipient's SSN ▶

31a

32 IRA deduction

32

33 Student loan interest deduction

33

34 Tuition and fees. Attach Form 8917

34

35 Domestic production activities deduction. Attach Form 8903

35

36 Add lines 23 through 35

36

53,465.

37 Subtract line 36 from line 22. This is your adjusted gross income ▶

37

608,611.

**Tax and Credits**

Standard Deduction for -  
 • People who check any box on line 39a or 39b or who can be claimed as a dependent.

• All others:  
 Single or Married filing separately, \$5,950  
 Married filing jointly or Qualifying widow(er), \$11,900  
 Head of household, \$8,700

38	Amount from line 37 (adjusted gross income)	38	608,611.
39a	Check <input type="checkbox"/> You were born before January 2, 1948, <input type="checkbox"/> Blind. <input type="checkbox"/> Spouse was born before January 2, 1948, <input type="checkbox"/> Blind. Total boxes checked <input type="checkbox"/> 39a <input type="checkbox"/> 39b		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here		
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	258,385.
41	Subtract line 40 from line 38	41	350,226.
42	Exemptions. Multiply \$3,800 by the number on line 6d	42	15,200.
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	335,026.
44	Tax. Check if any from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972 c <input type="checkbox"/> 962 election	44	87,465.
45	Alternative minimum tax. Attach Form 6251	45	21,221.
46	Add lines 44 and 45	46	108,686.
47	Foreign tax credit. Attach Form 1116 if required	47	3,402.
48	Credit for child and dependent care expenses. Attach Form 2441	48	
49	Education credits from Form 8863, line 19	49	
50	Retirement savings contributions credit. Attach Form 8880	50	
51	Child tax credit. Attach Schedule 8812, if required	51	
52	Residential energy credits. Attach Form 5695	52	
53	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	53	
54	Add lines 47 through 53. These are your total credits	54	3,402.
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-	55	105,284.
56	Self-employment tax. Attach Schedule SE	56	6,930.
57	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	57	
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	
59a	Household employment taxes from Schedule H	59a	
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	
60	Other taxes. Enter code(s) from Instructions	60	
61	Add lines 55 through 60. This is your total tax	61	112,214.

**Payments**

62	Federal income tax withheld from Forms W-2 and 1099	62	99,514.
63	2012 estimated tax payments and amount applied from 2011 return	63	29,515.
64a	Earned income credit (EIC)	64a	
b	Nontaxable combat pay election	64b	
65	Additional child tax credit. Attach Schedule 8812	65	
66	American opportunity credit from Form 8863, line 8	66	
67	Reserved	67	
68	Amount paid with request for extension to file	68	
69	Excess social security and tier 1 RRTA tax withheld	69	
70	Credit for federal tax on fuels. Attach Form 4136	70	
71	Credits from Form: a <input type="checkbox"/> 2439 b <input type="checkbox"/> Reserved c <input type="checkbox"/> 8801 d <input type="checkbox"/> 8885	71	
72	Add lines 62, 63, 64a, and 65 through 71. These are your total payments	72	129,029.

**Refund**

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	16,815.
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	74a	
75	Amount of line 73 you want applied to your 2013 estimated tax	75	16,815.

**Amount You Owe**

76	Amount you owe. Subtract line 72 from line 61. For details on how to pay, see instructions	76	
77	Estimated tax penalty (see instructions)	77	

**Third Party Designee**

Do you want to allow another person to discuss this return with the IRS (see instructions)? ☒ Yes. Complete below. ☐ No

**Sign Here**

Joint return? See instructions. Keep a copy for your records.

Designee's name <b>MICHAEL S SOLHEIM</b>	Phone no.	Personal identification number (PIN)
Your signature	Date <b>4/8/2013</b>	Your occupation <b>US PRESIDENT</b>
Spouse's signature. If a joint return, both must sign.	Date <b>4/8/13</b>	Spouse's occupation <b>US FIRST LADY</b>
Daytime phone number		If the IRS sent you an Identity Protection PIN, enter it here

**Paid**

Preparer's name <b>MICHAEL S SOLHEIM</b>	Preparer's signature	Date <b>4/3/13</b>	Check <input type="checkbox"/> if self-employed	PIN
--	----------------------	--------------------	---	-----

**Use Only**

Firm's name <b>WINEBERG SOLHEIM HOWELL &amp; SHAIN, PC</b>	Firm's EIN
--	------------

180 N LASALLE ST, STE 2200

Phone no.

Form **2210**Department of the Treasury  
Internal Revenue Service**Underpayment of Estimated Tax by  
Individuals, Estates, and Trusts**► Information about Form 2210 and its separate instructions is at [www.irs.gov/form2210](http://www.irs.gov/form2210).

► Attach to Form 1040, 1040A, 1040NR, 1040NR-EZ, or 1041.

OMB No. 1545-0140

**2012**Attachment  
Sequence No. **06**

Name(s) shown on tax return

Identifying number

BARACK H. &amp; MICHELLE L. OBAMA

**Do You Have To File Form 2210?**

Complete lines 1 through 7 below. Is line 7 less than \$1,000?	Yes	Do not file Form 2210. You do not owe a penalty.
No		
Complete lines 8 and 9 below. Is line 8 equal to or more than line 9?	Yes	You do not owe a penalty. Do not file Form 2210 (but if box E in Part II applies, you must file page 1 of Form 2210).
No		
You may owe a penalty. Does any box in Part II below apply?	Yes	You must file Form 2210. Does box B, C, or D in Part II apply?
No		
Do not file Form 2210. You are not required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return, but do not file Form 2210.	No	You are not required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return, but file only page 1 of Form 2210.
	Yes	You must figure your penalty.

**Part I Required Annual Payment**

1	Enter your 2012 tax after credits from Form 1040, line 55 (see instructions if not filing Form 1040)	1	105,284.
2	Other taxes, including self-employment tax (see instructions)	2	6,930.
3	Refundable credits (see instructions)	3	( )
4	Current year tax. Combine lines 1, 2, and 3. If less than \$1,000, stop; you do not owe a penalty. Do not file Form 2210	4	112,214.
5	Multiply line 4 by 90% (.90)	5	100,993.
6	Withholding taxes. Do not include estimated tax payments (see instructions)	6	99,514.
7	Subtract line 6 from line 4. If less than \$1,000, stop; you do not owe a penalty. Do not file Form 2210	7	12,700.
8	Maximum required annual payment based on prior year's tax (see instructions)	8	178,281.
9	Required annual payment. Enter the smaller of line 5 or line 8	9	100,993.

Next: Is line 9 more than line 6?

- ☐ No. You do not owe a penalty. Do not file Form 2210 unless box E below applies.
- ☒ Yes. You may owe a penalty, but do not file Form 2210 unless one or more boxes in Part II below applies.
- If box B, C, or D applies, you must figure your penalty and file Form 2210.
  - If box A or E applies (but not B, C, or D) file only page 1 of Form 2210. You are not required to figure your penalty; the IRS will figure it and send you a bill for any unpaid amount. If you want to figure your penalty, you may use Part III or IV as a worksheet and enter your penalty on your tax return, but file only page 1 of Form 2210.

**Part II Reasons for Filing.** Check applicable boxes. If none apply, do not file Form 2210.

- A ☐ You request a waiver (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you are not required to figure your penalty.
- B ☐ You request a waiver (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C ☐ Your income varied during the year and your penalty is reduced or eliminated when figured using the annualized income installment method. You must figure the penalty using Schedule AI and file Form 2210.
- D ☐ Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E ☐ You filed or are filing a joint return for either 2011 or 2012, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you are not required to figure your penalty (unless box B, C, or D applies).

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 2210 (2012)

**Part IV Regular Method** (See the instructions if you are filing Form 1040NR or 1040NR-EZ.)

Section A - Figure Your Underpayment		Payment Due Dates				
		(a) 4/15/12	(b) 6/15/12	(c) 9/15/12	(d) 1/15/13	
18	Required installments. If box C in Part II applies, enter the amounts from Schedule AI, line 25. Otherwise, enter 25% (.25) of line 9, Form 2210, in each column	18	25,248.	25,248.	25,248.	25,249.
19	Estimated tax paid and tax withheld. For column (a) only, also enter the amount from line 19 on line 23. If line 19 is equal to or more than line 18 for all payment periods, stop here; you do not owe a penalty. Do not file Form 2210 unless you checked a box in Part II	19	49,394.	24,879.	29,879.	24,877.
Complete lines 20 through 26 of one column before going to line 20 of the next column.						
20	Enter the amount, if any, from line 26 in the previous column	20		24,146.	23,777.	28,408.
21	Add lines 19 and 20	21		49,025.	53,656.	53,285.
22	Add the amounts on lines 24 and 25 in the previous column	22				
23	Subtract line 22 from line 21. If zero or less, enter -0-. For column (a) only, enter the amount from line 19	23	49,394.	49,025.	53,656.	53,285.
24	If line 23 is zero, subtract line 21 from line 22. Otherwise, enter -0-	24		0.	0.	
25	Underpayment. If line 18 is equal to or more than line 23, subtract line 23 from line 18. Then go to line 20 of the next column. Otherwise, go to line 26	25				
26	Overpayment. If line 23 is more than line 18, subtract line 18 from line 23. Then go to line 20 of the next column	26	24,146.	23,777.	28,408.	
<b>Section B - Figure the Penalty</b> (Use the Worksheet for Form 2210, Part IV, Section B - Figure the Penalty in the instructions.)						
27	Penalty. Enter the total penalty from line 14 of the Worksheet for Form 2210, Part IV, Section B - Figure the Penalty. Also include this amount on Form 1040, line 77; Form 1040A, line 46; Form 1040NR, line 74; Form 1040NR-EZ, line 26; or Form 1041, line 26. Do not file Form 2210 unless you checked a box in Part II	27				0.

Form 2210 (2012)

**SCHEDULE A**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Itemized Deductions**

Information about Schedule A and its separate instructions is at [www.irs.gov/form1040](http://www.irs.gov/form1040).  
Attach to Form 1040.

OMB No. 1545-0074

**2012**  
Attachment  
Sequence No. 07

Name(s) shown on Form 1040

Your social security number

**BARACK H. & MICHELLE L. OBAMA**

<b>Medical and Dental Expenses</b>	Caution. Do not include expenses reimbursed or paid by others.		
1	Medical and dental expenses (see instructions)	1	
2	Enter amount from Form 1040, line 38	2	
3	Multiply line 2 by 7.5% (.075)	3	
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	
<b>Taxes You Paid</b>	5 State and local (check only one box):	5	36,554.
	a <input checked="" type="checkbox"/> Income taxes, or		
	b <input type="checkbox"/> General sales taxes		
	6 Real estate taxes (see instructions)	6	26,751.
	7 Personal property taxes	7	
	8 Other taxes. List type and amount	8	
	9 Add lines 5 through 8	9	63,305.
<b>Interest You Paid</b>	10 Home mortgage interest and points reported to you on Form 1098	10	45,046.
	11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address	11	
Note. Your mortgage interest deduction may be limited (see instructions).	12 Points not reported to you on Form 1098. See instructions for special rules	12	
	13 Mortgage insurance premiums (see instructions)	13	
	14 Investment interest. Attach Form 4952 if required. (See instructions.)	14	
	15 Add lines 10 through 14	15	45,046.
<b>Gifts to Charity</b>	16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions	16	150,034. STMT 3
	17 Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	17	
	18 Carryover from prior year	18	
	19 Add lines 16 through 18	19	150,034.
<b>Casualty and Theft Losses</b>	20 Casualty or theft loss(es). Attach Form 4684. (See instructions.)	20	
<b>Job Expenses and Certain Miscellaneous Deductions</b>	21 Unreimbursed employee expenses: job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.)	21	
	22 Tax preparation fees	22	
	23 Other expenses: investment, safe deposit box, etc. List type and amount	23	
	24 Add lines 21 through 23	24	
	25 Enter amount from Form 1040, line 38	25	
	26 Multiply line 25 by 2% (.02)	26	
	27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-	27	
<b>Other Miscellaneous Deductions</b>	28 Other: from list in instructions. List type and amount	28	
<b>Total Itemized Deductions</b>	29 Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40	29	258,385.
	30 If you elect to itemize deductions even though they are less than your standard deduction, check here		<input type="checkbox"/>

**SCHEDULE B**

(Form 1040A or 1040)

Department of the Treasury  
Internal Revenue Service (99)  
Name(s) shown on return

**Interest and Ordinary Dividends**

▶ Attach to Form 1040A or 1040.

Information about Schedule B (Form 1040A or 1040) and its instructions is at [www.irs.gov/form1040](http://www.irs.gov/form1040).

OMB No. 1545-0074

**2012**

Attachment  
Sequence No. 08

Your social security number

**BARACK H. & MICHELLE L. OBAMA**

**Part I  
Interest**

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see instructions and list this interest first. Also, show that buyer's social security number and address ▶

**BOND PREMIUM AMORTIZATION**

**JP MORGAN**

**NORTHERN TRUST SECURITIES US GOVT INTEREST**

**NORTHERN TRUST SECURITIES US GOVT INTEREST PAID**

**Amount**

-3,508.

44.

16,348.

-1,422.

Note. If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

- 2 Add the amounts on line 1

- 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989.

Attach Form 8815

- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶

Note. If line 4 is over \$1,500, you must complete Part III.

11,462.

11,462.

**Part II  
Ordinary  
Dividends**

- 5 List name of payer ▶

**NORTHERN TRUST SECURITIES**

**Amount**

2.

Note. If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

- 6 Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶

Note. If line 6 is over \$1,500, you must complete Part III.

2.

**Part III  
Foreign  
Accounts  
and  
Trusts**

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

Yes No

- 7a At any time during 2012, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions

If "Yes," are you required to file Form TD F 90-22.1 to report that financial interest or signature authority? See Form TD F 90-22.1 and its instructions for filing requirements and exceptions to those requirements

- b If you are required to file Form TD F 90-22.1, enter the name of the foreign country where the financial account is located ▶

- 8 During 2012, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

If "Yes," you may have to file Form 3520. See instructions

X

227501  
09-25-12

LHA For Paperwork Reduction Act Notice, see separate instructions.

Schedule B (Form 1040A or 1040) 2012

**SCHEDULE C**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Profit or Loss From Business**  
(Sole Proprietorship)

▶ For information on Schedule C and its instructions, go to [www.irs.gov/schedulec](http://www.irs.gov/schedulec).  
▶ Attach to Form 1040, 1040NR, or 1041; partnerships generally must file Form 1065.

OMB No. 1545-0074

**2012**

Attachment  
Sequence No. 09

Name of proprietor

**BARACK H. OBAMA**

Social security number (SSN)

A Principal business or profession, including product or service (see instructions)

**AUTHOR**

B Enter code from instructions

**711510**

C Business name. If no separate business name, leave blank.

**BARACK H. OBAMA**

D Employer ID number (EIN), (see instr.)

E Business address (including suite or room no.) ▶

City, town or post office, state, and ZIP code

F Accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other (specify) ▶

G Did you "materially participate" in the operation of this business during 2012? If "No," see instructions for limit on losses ☒ Yes ☐ No

H If you started or acquired this business during 2012, check here ☐

I Did you make any payments in 2012 that would require you to file Form(s) 1099? (see instructions) ☐ Yes ☒ No

J If "Yes," did you or will you file required Forms 1099? ☐ Yes ☐ No

**Part I Income**

1	Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked <input type="checkbox"/>	1	
2	Returns and allowances (see instructions) <input type="checkbox"/>	2	
3	Subtract line 2 from line 1	3	
4	Cost of goods sold (from line 42)	4	
5	Gross profit. Subtract line 4 from line 3	5	
6	Other income, including federal and state gasoline or fuel tax credit or refund (see instructions) <b>SEE STATEMENT 4</b>	6	<b>273,739.</b>
7	Gross income. Add lines 5 and 6	7	<b>273,739.</b>

**Part II Expenses**

Enter expenses for business use of your home only on line 30.

8	Advertising	8		18	Office expense	18	<b>519.</b>
9	Car and truck expenses (see instructions)	9		19	Pension and profit-sharing plans	19	
10	Commissions and fees	10	<b>14,448.</b>	20	Rent or lease (see instructions):		
11	Contract labor (see instructions)	11		a	Vehicles, machinery, and equipment	20a	
12	Depletion	12		b	Other business property	20b	
13	Depreciation and section 179 expense deduction (not included in Part III) (see instructions)	13		21	Repairs and maintenance	21	
14	Employee benefit programs (other than on line 19)	14		22	Supplies (not included in Part III)	22	
15	Insurance (other than health)	15		23	Taxes and licenses	23	
16	Interest:			24	Travel, meals, and entertainment:		
a	Mortgage (paid to banks, etc.)	16a		a	Travel	24a	
b	Other	16b		b	Deductible meals and entertainment (see instructions)	24b	
17	Legal and professional services	17		25	Utilities	25	
28	Total expenses before expenses for business use of home. Add lines 8 through 27a	28	<b>14,967.</b>	26	Wages (less employment credits)	26	
29	Tentative profit or (loss). Subtract line 28 from line 7	29	<b>258,772.</b>	27 a	Other expenses (from line 48)	27a	
30	Expenses for business use of your home. Attach Form 8829. Do not report such expenses elsewhere	30		b	Reserved for future use	27b	
31	Net profit or (loss). Subtract line 30 from line 29. • If a profit, enter on both Form 1040, line 12 (or Form 1040NR, line 13) and on Schedule SE, line 2. (If you checked the box on line 1, see instructions). Estates and trusts, enter on Form 1041, line 3. • If a loss, you must go to line 32.	31	<b>258,772.</b>				

32 If you have a loss, check the box that describes your investment in this activity (see instructions).  
• If you checked 32a, enter the loss on both Form 1040, line 12, (or Form 1040NR, line 13) and on Schedule SE, line 2.  
(If you checked the box on line 1, see the line 31 instructions). Estates and trusts, enter on Form 1041, line 3.  
• If you checked 32b, you must attach Form 6198. Your loss may be limited.

32a ☐ All investment is at risk.  
32b ☐ Some investment is not at risk.

LHA For Paperwork Reduction Act Notice, see separate instructions.

Schedule C (Form 1040) 2012

**SCHEDULE D**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Capital Gains and Losses**

▶ Attach to Form 1040 or Form 1040NR.

▶ Information about Schedule D and its separate instructions is at [www.irs.gov/form1040](http://www.irs.gov/form1040).  
▶ Use Form 8949 to list your transactions for lines 1, 2, 3, 8, 9, and 10.

OMB No. 1545-0074

**2012**

Attachment  
Sequence No. 12

Name(s) shown on return

Your social security number

BARACK H. & MICHELLE L. OBAMA

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

Complete Form 8949 before completing line 1, 2, or 3.  
This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price) from Form(s) 8949, Part I, line 2, column (d)	(e) Cost or other basis from Form(s) 8949, Part I, line 2, column (e)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (g) from column (d) and combine the result with column (g)
1 Short-term totals from all Forms 8949 with box A checked in Part I				
2 Short-term totals from all Forms 8949 with box B checked in Part I	992,000.	992,000.		0.
3 Short-term totals from all Forms 8949 with box C checked in Part I				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ( )
7 Net short-term capital gain or (loss). Combine lines 1 through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2				7

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

Complete Form 8949 before completing line 8, 9, or 10.  
This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price) from Form(s) 8949, Part II, line 4, column (d)	(e) Cost or other basis from Form(s) 8949, Part II, line 4, column (e)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 4, column (g)	(h) Gain or (loss) Subtract column (g) from column (d) and combine the result with column (g)
8 Long-term totals from all Forms 8949 with box A checked in Part II				
9 Long-term totals from all Forms 8949 with box B checked in Part II	1,016,000.	1,015,365.		635.
10 Long-term totals from all Forms 8949 with box C checked in Part II				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
13 Capital gain distributions				13
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 ( 116,151 )
15 Net long-term capital gain or (loss). Combine lines 8 through 14 in column (h). Then go to Part III on page 2				15 <115,516.>

LHA For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule D (Form 1040) 2012



**Part III Summary**

16 Combine lines 7 and 15 and enter the result	16	<115,516.>
<ul style="list-style-type: none"> <li>If line 16 is a gain, enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 17 below.</li> <li>If line 16 is a loss, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.</li> <li>If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 22.</li> </ul>		
17 Are lines 15 and 16 both gains? <input type="checkbox"/> Yes. Go to line 18. <input type="checkbox"/> No. Skip lines 18 through 21, and go to line 22.		
18 Enter the amount, if any, from line 7 of the 28% Rate Gain Worksheet in the instructions	18	
19 Enter the amount, if any, from line 18 of the Unrecaptured Section 1250 Gain Worksheet in the instructions	19	
20 Are lines 18 and 19 both zero or blank? <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). Do not complete lines 21 and 22 below. <input type="checkbox"/> No. Complete the Schedule D Tax Worksheet in the instructions. Do not complete lines 21 and 22 below.		
21 If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the smaller of: <ul style="list-style-type: none"> <li>The loss on line 16 or</li> <li>(\$3,000), or if married filing separately, (\$1,500)</li> </ul> Note. When figuring which amount is smaller, treat both amounts as positive numbers.	21	( SEE STATEMENT 5 3,000.)
22 Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b? <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). <input checked="" type="checkbox"/> No. Complete the rest of Form 1040 or Form 1040NR.		

Schedule D (Form 1040) 2012

## Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

# 2012

Attachment  
Sequence No. 12A

Department of the Treasury  
Internal Revenue Service (99)

▶ Information about Form 8949 and its separate instructions is at [www.irs.gov/form8949](http://www.irs.gov/form8949).  
▶ File with your Schedule D to list your transactions for lines 1, 2, 3, 8, 9, and 10 of Schedule D.

Name(s) shown on return

**Social security number or taxpayer identification no.**

BARACK H. & MICHELLE L. OBAMA

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

**Part I Short-Term.** Transactions involving capital assets you held one year or less are short-term. For long-term transactions, see page 2.

You *must* check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- ☐ (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS
- ☒ (B) Short-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS
- ☐ (C) Short-term transactions not reported to you on Form 1099-B

[illegible]

**Note.** If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.



Name of person with self-employment income (as shown on Form 1040)

Social security number of  
person with self-employment  
income

BARACK H. OBAMA

## Section B - Long Schedule SE

## Part I Self-Employment Tax

Note. If your only income subject to self-employment tax is church employee income, see instructions. Also see instructions for the definition of church employee income.

A If you are a minister, member of a religious order, or Christian Science practitioner and you filed Form 4361, but you had \$400 or more of other net earnings from self-employment, check here and continue with Part I ☐

1a Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A. Note. Skip lines 1a and 1b if you use the farm optional method (see instructions) 1a

b If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code Y 1b

2 Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), box 14, code A (other than farming); and Schedule K-1 (Form 1065-B), box 9, code J1. Ministers and members of religious orders, see instructions for types of income to report on this line. See instructions for the definition of church employee income. Note. Skip this line if you use the nonfarm optional method (see instructions) SEE STATEMENT 6 2 258,772.

3 Combine lines 1a, 1b, and 2 3 258,772.

4a If line 3 is more than zero, multiply line 3 by 92.35% (.9235). Otherwise, enter amount from line 3 4a 238,976.

Note. If line 4a is less than \$400 due to Conservation Reserve Program payments on line 1b, see instructions.

b If you elect one or both of the optional methods, enter the total of lines 15 and 17 here 4b

c Combine lines 4a and 4b. If less than \$400, stop; you do not owe self-employment tax. Exception. If less than \$400 and you had church employee income, enter -0- and continue 4c 238,976.

5a Enter your church employee income from Form W-2. See instructions for definition of church employee income 5a

b Multiply line 5a by 92.35% (.9235). If less than \$100, enter -0- 5b

6 Add lines 4c and 5b 6 238,976.

7 Maximum amount of combined wages and self-employment earnings subject to social security tax or the 4.2% portion of the 5.65% railroad retirement (tier 1) tax for 2012 7 110,100.00

8a Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation. If \$110,100 or more, skip lines 8b through 10, and go to line 11 8a 110,100.

b Unreported tips subject to social security tax (from Form 4137, line 10) 8b

c Wages subject to social security tax (from Form 8919, line 10) 8c

d Add lines 8a, 8b, and 8c 8d

9 Subtract line 8d from line 7. If zero or less, enter -0- here and on line 10 and go to line 11 9

10 Multiply the smaller of line 6 or line 9 by 10.4% (.104) 10

11 Multiply line 6 by 2.9% (.029) 11 6,930.

12 Self-employment tax. Add lines 10 and 11. Enter here and on Form 1040, line 56, or Form 1040NR, line 54 12 6,930.

13 Deduction for employer-equivalent portion of self-employment tax. Add the two following amounts.  
• 59.6% (.596) of line 10.  
• One-half of line 11.  
Enter the result here and on Form 1040, line 27, or Form 1040NR, line 27 13 3,465.

## Part II Optional Methods To Figure Net Earnings (see instructions)

Farm Optional Method. You may use this method only if (a) your gross farm income<sup>1</sup> was not more than \$6,780, or (b) your net farm profits<sup>2</sup> were less than \$4,894.

14 Maximum income for optional methods 14 4,520.00

15 Enter the smaller of: two-thirds (2/3) of gross farm income<sup>1</sup> (not less than zero) or \$4,520. Also include this amount on line 4b above 15

Nonfarm Optional Method. You may use this method only if (a) your net nonfarm profits<sup>3</sup> were less than \$4,894 and also less than 72.189% of your gross nonfarm income<sup>4</sup>, and (b) you had net earnings from self-employment of at least \$400 in 2 of the prior 3 years.  
Caution. You may use this method no more than five times.

16 Subtract line 15 from line 14 16

17 Enter the smaller of: two-thirds (2/3) of gross nonfarm income<sup>4</sup> (not less than zero) or the amount on line 16. Also include this amount on line 4b above 17

<sup>1</sup> From Sch. F, line 9, and Sch. K-1 (Form 1065), box 14, code B.  
<sup>2</sup> From Sch. F, line 34, and Sch. K-1 (Form 1065), box 14, code A - minus the amount you would have entered on line 1b had you not used the optional method.  
<sup>3</sup> From Sch. C, line 31; Sch. C-EZ, line 3; Sch. K-1 (Form 1065), box 14, code A; and Sch. K-1 (Form 1065-B), box 9, code J1.  
<sup>4</sup> From Sch. C, line 7; Sch. C-EZ, line 1; Sch. K-1 (Form 1065), box 14, code C; and Sch. K-1 (Form 1065-B), box 9, code J2.

Form **1116****Foreign Tax Credit**

OMB No. 1545-0121

**2012**Department of the Treasury  
Internal Revenue Service (99)

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ Information about Form 1116 and its separate instructions is at [www.irs.gov/form1116](http://www.irs.gov/form1116)Attachment  
Sequence No. **19**

Name

Identifying number as shown on page 1 of your tax return

**BARACK H. & MICHELLE L. OBAMA**

Use a separate Form 1116 for each category of income listed below. See Categories of Income in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a ☐ Passive category income      c ☐ Section 901(j) income      e ☐ Lump-sum distributions  
 b ☒ General category income      d ☐ Certain income re-sourced by treaty

f Resident of (name of country) ▶ **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

**Part I** Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession	OTHER COUNTRIES			
1a Gross income from sources within country shown above and of the type checked above:	39,875.			1a 39,875.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶ <input type="checkbox"/>				
<b>Deductions and losses (Caution: See instructions):</b>				
2 Expenses definitely related to the income on line 1a (attach statement) <b>SEE STATEMENT 7</b>	7,702.			
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction	63,305.			
b Other deductions (attach statement)				
c Add lines 3a and 3b	63,305.			
d Gross foreign source income	39,875.			
e Gross income from all sources	680,678.			
f Divide line 3d by line 3e	.058581			
g Multiply line 3c by line 3f	3,708.			
4 Pro rata share of interest expense:				
a Home mortgage interest (use worksheet for Home Mortgage Interest in the instructions)	2,639.			
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	14,049.			6 14,049.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 25,826.

**Part II** Foreign Taxes Paid or Accrued

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued (j) Date paid or accrued	Foreign taxes paid or accrued						(r) Other foreign taxes paid or accrued	(s) Total foreign taxes paid or accrued (add cols. (o) through (r))
		In foreign currency			In U.S. dollars				
		Taxes withheld at source on:			Taxes withheld at source on:				
		(k) Dividends	(l) Rents and royalties	(m) Interest	(n) Other foreign taxes paid or accrued	(o) Dividends	(p) Rents and royalties		
A						3,402.			3,402.
B									
C									

8 Add lines A through C, column (s). Enter the total here and on line 9, page 2 ▶ 8 3,402.

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2012)

**Part III Figuring the Credit**

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	3,402.	
10	Carryback or carryover (attach detailed computation)	10		
11	Add lines 9 and 10	11	3,402.	
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14	3,402.	
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	25,826.	
16	Adjustments to line 15	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17	25,826.	
18	Individuals: Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption	18	350,226.	
<i>Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.</i>				
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19	.073741	
20	Individuals: Enter the amount from Form 1040, line 44. If you are a nonresident alien, enter the amount from Form 1040NR, line 42. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37	20	87,465.	
<i>Caution: If you are completing line 20 for separate category (lump-sum distributions), see instructions.</i>				
21	Multiply line 20 by line 19 (maximum amount of credit)	21	6,450.	
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22	3,402.	

**Part IV Summary of Credits From Separate Parts III**

23	Credit for taxes on passive category income	23		
24	Credit for taxes on general category income	24		
25	Credit for taxes on certain income re-sourced by treaty	25		
26	Credit for taxes on lump-sum distributions	26		
27	Add lines 23 through 26	27		
28	Enter the smaller of line 20 or line 27	28	3,402.	
29	Reduction of credit for international boycott operations	29		
30	Subtract line 29 from line 28. This is your foreign tax credit. Enter here and on Form 1040, line 47; Form 1040NR, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a	30	3,402.	

Form **6251**Department of the Treasury  
Internal Revenue Service (99)**Alternative Minimum Tax - Individuals**► Information about Form 6251 and its separate instructions is at [www.irs.gov/form6251](http://www.irs.gov/form6251).

► Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074

**2012**Attachment  
Sequence No. 32

Name(s) shown on Form 1040 or Form 1040NR

Your social security number

**BARACK H. & MICHELLE L. OBAMA****Part I Alternative Minimum Taxable Income**

1 If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41, and go to line 2. Otherwise, enter the amount from Form 1040, line 38, and go to line 7. (If less than zero, enter as a negative amount.)	1	350,226.
2 Medical and dental. Enter the smaller of Schedule A (Form 1040), line 4, or 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-	2	
3 Taxes from Schedule A (Form 1040), line 9	3	63,305.
4 Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line	4	
5 Miscellaneous deductions from Schedule A (Form 1040), line 27	5	
6 Skip this line. It is reserved for future use	6	
7 Tax refund from Form 1040, line 10 or line 21	7	
8 Investment interest expense (difference between regular tax and AMT)	8	
9 Depletion (difference between regular tax and AMT)	9	
10 Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11 Alternative tax net operating loss deduction	11	
12 Interest from specified private activity bonds exempt from the regular tax	12	
13 Qualified small business stock (7% of gain excluded under section 1202)	13	
14 Exercise of incentive stock options (excess of AMT income over regular tax income)	14	
15 Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	15	
16 Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	16	
17 Disposition of property (difference between AMT and regular tax gain or loss)	17	
18 Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	18	
19 Passive activities (difference between AMT and regular tax income or loss)	19	
20 Loss limitations (difference between AMT and regular tax income or loss)	20	
21 Circulation costs (difference between regular tax and AMT)	21	
22 Long-term contracts (difference between AMT and regular tax income)	22	
23 Mining costs (difference between regular tax and AMT)	23	
24 Research and experimental costs (difference between regular tax and AMT)	24	
25 Income from certain installment sales before January 1, 1987	25	
26 Intangible drilling costs preference	26	
27 Other adjustments, including income-based related adjustments	27	
28 Alternative minimum taxable income. Combine lines 1 through 27. (If married filing separately, see instructions.)	28	413,531.

**Part II Alternative Minimum Tax (AMT)**

29 Exemption. See instructions	SEE STATEMENT 8	29	12,867.
30 Subtract line 29 from line 28. If more than zero, go to line 31. If zero or less, enter -0- here and on lines 31, 33, and 35, and go to line 34		30	400,664.
31 • If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on page 2 and enter the amount from line 54 here. • All others: If line 30 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result.		31	108,686.
32 Alternative minimum tax foreign tax credit (see instructions)		32	3,402.
33 Tentative minimum tax. Subtract line 32 from line 31		33	105,284.
34 Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 47). If you used Sch J to figure your tax, the amount from line 44 of Form 1040 must be refigured without using Sch J		34	84,063.
35 AMT. Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45		35	21,221.

LHA For Paperwork Reduction Act Notice, see your tax return instructions.

Form 6251 (2012)

**Part III Tax Computation Using Maximum Capital Gains Rates..**

Complete Part III only if you are required to do so by line 31 or by the Foreign Earned Income Tax Worksheet in the instructions.

36	Enter the amount from Form 6251, line 30. If you are filing Form 2555 or 2555-EZ, enter the amount from line 3 of the worksheet in the instructions for line 31 .....	36
37	Enter the amount from line 6 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 13 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as figured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter .....	37
38	Enter the amount from Schedule D (Form 1040), line 19 (as figured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter .....	38
39	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as figured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter .....	39
40	Enter the smaller of line 36 or line 39 .....	40
41	Subtract line 40 from line 36 .....	41
42	If line 41 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 41 by 26% (.26). Otherwise, multiply line 41 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result .....	42
43	Enter: <ul style="list-style-type: none"> <li>• \$70,700 if married filing jointly or qualifying widow(er),</li> <li>• \$35,350 if single or married filing separately, or</li> <li>• \$47,350 if head of household.</li> </ul> .....	43
44	Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter -0- .....	44
45	Subtract line 44 from line 43. If zero or less, enter -0- .....	45
46	Enter the smaller of line 36 or line 37 .....	46
47	Enter the smaller of line 45 or line 46 .....	47
48	Subtract line 47 from line 46 .....	48
49	Multiply line 48 by 15% (.15) .....	49
	If line 38 is zero or blank, skip lines 50 and 51 and go to line 52. Otherwise, go to line 50.	
50	Subtract line 46 from line 40 .....	50
51	Multiply line 50 by 25% (.25) .....	51
52	Add lines 42, 49, and 51 .....	52
53	If line 36 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result .....	53
54	Enter the smaller of line 52 or line 53 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter this amount on line 31. Instead, enter it on line 4 of the worksheet in the instructions for line 31 .....	54

Form 6251 (2012)



**ALTERNATIVE MINIMUM TAX  
Foreign Tax Credit**

OMB No. 1545-0121

**1116**

**2012**

Department of the Treasury  
Internal Revenue Service (99)

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ Information about Form 1116 and its separate instructions is at [www.irs.gov/form1116](http://www.irs.gov/form1116).

Attachment  
Sequence No. **19**

Name

Identifying number as shown on page 1 of your tax return

**BARACK H. & MICHELLE L. OBAMA**

Use a separate Form 1116 for each category of income listed below. See Categories of Income in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a ☐ Passive category income      c ☐ Section 901(f) income      e ☐ Lump-sum distributions  
b ☒ General category income      d ☐ Certain income re-sourced by treaty

f Resident of (name of country) ▶ **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

**Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)**

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession	OTHER COUNTRIES			
1a Gross income from sources within country shown above and of the type checked above:	39,875.			1a 39,875.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶ <input type="checkbox"/>				
Deductions and losses (Caution: See instructions):				
2 Expenses definitely related to the income on line 1a (attach statement)	7,702.			
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction				
b Other deductions (attach statement)				
c Add lines 3a and 3b				
d Gross foreign source income	39,875.			
e Gross income from all sources	680,678.			
f Divide line 3d by line 3e	.058581			
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense:				
a Home mortgage interest (use worksheet for Home Mortgage Interest in the instructions)	2,639.			
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	10,341.			6 10,341.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 29,534.

**Part II Foreign Taxes Paid or Accrued**

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued							
		In foreign currency				In U.S. dollars			
		Taxes withheld at source on:				Taxes withheld at source on:			
		(j) Date paid or accrued	(k) Dividends	(l) Rents and royalties	(m) Interest	(n) Other foreign taxes paid or accrued	(o) Dividends	(p) Rents and royalties	(q) Interest
A						3,402.			
B									
C									
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2									8 3,402.

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2012)

# ALTERNATIVE MINIMUM TAX

Form 1116 (2012) **BARACK H. & MICHELLE L. OBAMA**

Page 2

## **Part III Figuring the Credit**

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	3,402.	
10	Carryback or carryover (attach detailed computation)	10		
11	Add lines 9 and 10	11	3,402.	
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14	3,402.	
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	29,534.	
16	Adjustments to line 15	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17	29,534.	
18	Individuals: Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption <i>Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.</i>	18	413,531.	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19	.071419	
20	Individuals: Enter the amount from Form 1040, line 44. If you are a nonresident alien, enter the amount from Form 1040NR, line 42. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37 <i>Caution: If you are completing line 20 for separate category (lump-sum distributions), see instructions.</i>	20	108,686.	
21	Multiply line 20 by line 19 (maximum amount of credit)	21	7,762.	
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22	3,402.	

## **Part IV Summary of Credits From Separate Parts III**

23	Credit for taxes on passive category income	23		
24	Credit for taxes on general category income	24		
25	Credit for taxes on certain income re-sourced by treaty	25		
26	Credit for taxes on lump-sum distributions	26		
27	Add lines 23 through 26	27		
28	Enter the smaller of line 20 or line 27	28	3,402.	
29	Reduction of credit for international boycott operations	29		
30	Subtract line 29 from line 28. This is your foreign tax credit. Enter here and on Form 1040, line 47; Form 1040NR, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a	30	3,402.	

Form 1116 (2012)

## Form 1116

## U.S. and Foreign Source Income Summary

NAME

BARACK H. &amp; MICHELLE L. OBAMA

INCOME TYPE	TOTAL	U.S.	FOREIGN GENERAL
Compensation	394,840.	394,840.	
Dividends/Distributions	2.	2.	
Interest	11,462.	11,462.	
Capital Gains	635.	635.	
Business/Profession	273,739.	273,739.	
Rent/Royalty			
State/Local Refunds			
Partnership/S Corporation			
Trust/Estate			
Other Income		-39,875.	39,875.
Gross Income	680,678.	640,803.	39,875.
Less:			
Section 911 Exclusion			
Capital Losses	3,635.	3,635.	
Capital Gains Tax Adjustment			
Total Income - Form 1116	677,043.	637,168.	39,875.
Deductions:			
Business/Profession Expenses	14,967.	14,967.	
Rent/Royalty Expenses			
Partnership/S Corporation Losses			
Trust/Estate Losses			
Capital Losses			
Non-capital Losses			
Individual Retirement Account			
Moving Expenses			
Self-employment Tax Deduction	3,465.	3,465.	
Self-employment Health Insurance			
Keogh Contributions	50,000.	50,000.	
Alimony			
Forfeited Interest			
Foreign Housing Deduction			
Other Adjustments		-7,702.	7,702.
Capital Gains Tax Adjustment			
Total Deductions	68,432.	60,730.	7,702.
Adjusted Gross Income	608,611.	576,438.	32,173.
Less Itemized Deductions:			
Specifically Allocated	150,034.	150,034.	
Home Mortgage Interest	45,046.	42,407.	2,639.
Other Interest			
Ratably Allocated	63,305.	59,597.	3,708.
Total Adjustments to Adjusted Gross Income	258,385.	252,038.	6,347.
Taxable Income Before Exemptions	350,226.	324,400.	25,826.

## Form 1116

## Allocation of Itemized Deductions

NAME

BARACK H. &amp; MICHELLE L. OBAMA

	Total Itemized Deductions	Itemized Deductions After Sec. 68 Reduction	Form 1116		
			Specifically U.S.	Specifically Foreign	Ratable
Taxes .....	63,305.				63,305.
Interest - Not Including Investment Interest .....	45,046.		42,407.	2,639.	
Contributions .....	150,034.		150,034.		
Miscellaneous Deductions Subject to 2% .....					
Other Miscellaneous Deductions - Not Including Gambling Losses .....					
Foreign Adjustment .....					
Total Itemized Deductions Subject to Sec. 68 .....	258,385.				
Add Itemized Deductions Not Subject to Sec. 68:					
Medical/Dental .....					
Investment Interest .....					
Casualty Losses .....					
Gambling Losses .....					
Foreign Adjustment .....					
Total Itemized Deductions .....	258,385.				
Total Allowed on Schedule A .....			192,441.	2,639.	63,305.

## Form 1116

## Foreign Tax Credit Carryover Statement (Page 1 of 2)

NAME

BARACK H. &amp; MICHELLE L. OBAMA

Foreign Income Category

GENERAL LIMITATION INCOME

Regular	2007	2008	2009	2010	2011	2012
1. Foreign tax paid/accrued						3,402.
2. FTC carryback to 2012 for amended returns						
3. Reduction allocated to excluded income						
4. Foreign tax available						3,402.
5. Maximum credit allowable						6,450.
6. Unused foreign tax ( + ) or excess of limit ( - )					-47,839.	-3,048.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Less treaty adjustment						
10. Foreign tax or excess limit remaining					-47,839.	-3,048.
Total foreign taxes from all available years to be carried to next year						

	2002	2003	2004	2005	2006
1. Foreign tax paid/accrued					
2. FTC carryback to 2012 for amended returns					
3. Reduction allocated to excluded income					
4. Foreign tax available					
5. Maximum credit allowable					
6. Unused foreign tax ( + ) or excess of limit ( - )					
7. Foreign tax carryback					
8. Foreign tax carryforward					
9. Less treaty adjustment					
10. Foreign tax or excess limit remaining					

NAME

BARACK H. &amp; MICHELLE L. OBAMA

Foreign Income Category

GENERAL LIMITATION INCOME

AMT	2007	2008	2009	2010	2011	2012
1. Foreign tax paid/accrued						3,402.
2. FTC carryback to 2012 for amended returns						
3. Reduction allocated to excluded income						
4. Foreign tax available						3,402.
5. Maximum credit allowable						7,762.
6. Unused foreign tax ( + ) or excess of limit ( - )					-51,343.	-4,360.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Less treaty adjustment						
10. Foreign tax or excess limit remaining					-51,343.	-4,360.
Total foreign taxes from all available years to be carried to next year						

	2002	2003	2004	2005	2006
1. Foreign tax paid/accrued					
2. FTC carryback to 2012 for amended returns					
3. Reduction allocated to excluded income					
4. Foreign tax available					
5. Maximum credit allowable					
6. Unused foreign tax ( + ) or excess of limit ( - )					
7. Foreign tax carryback					
8. Foreign tax carryforward					
9. Less treaty adjustment					
10. Foreign tax or excess limit remaining					

BARACK H. & MICHELLE L. OBAMA

FORM 1040 WAGES RECEIVED AND TAXES WITHHELD STATEMENT 1

T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T DFAS-CIVPAY DIRECTORATE	394,840.	99,514.	18,942.		4,624.	5,725.
TOTALS	394,840.	99,514.	18,942.		4,624.	5,725.

SCHEDULE A STATE AND LOCAL INCOME TAXES STATEMENT 2

DESCRIPTION	AMOUNT
DFAS-CIVPAY DIRECTORATE	18,942.
ILLINOIS 2ND QTR ESTIMATE PAYMENTS	3,000.
ILLINOIS 3RD QTR ESTIMATE PAYMENTS	3,000.
ILLINOIS 4TH QTR ESTIMATE PAYMENTS	5,000.
ILLINOIS PRIOR YEAR ESTIMATE PAYMENTS	6,000.
ILLINOIS PRIOR YEAR BALANCE DUE AND EXTENSION PAYMENTS	612.
TOTAL TO SCHEDULE A, LINE 5	36,554.

SCHEDULE A CASH CONTRIBUTIONS STATEMENT 3

DESCRIPTION	AMOUNT 50% LIMIT	AMOUNT 30% LIMIT
AMERICAN CANCER SOCIETY	100.	
AMERICAN RED CROSS	3,000.	
BOYS & GIRLS CLUB	2,000.	
CALVARY WOMEN'S SHELTER	1,000.	
CARE	1,000.	
CENTRAL ILLINOIS FOOD BANK	1,000.	
CHILDREN'S NATIONAL MEDICAL CENTER	2,063.	
CITIZENS UNITED FOR RESEARCH IN EPILEPSY	2,000.	
FISHER HOUSE FOUNDATION	103,871.	
HABITAT FOR HUMANITY	2,000.	
ILLINOIS HEAD START ASSOCIATION	1,000.	
ILLINOIS READING COUNCIL	1,000.	
JUVENILE DIABETES RESEARCH FOUNDATION	1,000.	
LEUKEMIA & LYMPHOMA SOCIETY	1,000.	

BARACK H. & MICHELLE L. OBAMA

LIFE PIECES TO MASTERPIECES	1,000.	
MIDTOWN EDUCATIONAL FOUNDATION	1,000.	
MIRIAM'S KITCHEN	1,000.	
MOSAIC YOUTH THEATRE OF DETROIT	1,000.	
MUJERES LATINAS EN ACCION	1,000.	
NATIONAL AIDS FUND	1,000.	
NATIONAL COALITION FOR HOMELESS VETERANS	1,000.	
NATIONAL CONGRESS OF BLACK WOMEN	1,000.	
NATIONAL MS SOCIETY	1,000.	
NATIONAL OVARIAN CANCER COALITION	1,000.	
PALM BEACH COUNTY LAW ENFORCEMENT FNDTN	5,000.	
ROCHELLE LEE FUND / BOUNDLESS READERS	1,000.	
ST. JOHN'S CHURCH	1,000.	
ST. LEO'S RESIDENCE FOR VETERANS	1,000.	
SIDWELL FRIENDS SCHOOL	5,000.	
THE CHRISTOPHER HOUSE	1,000.	
THE HARMONY PROJECT	1,000.	
UNITED NEGRO COLLEGE FUND	2,000.	
UNIVERSITY OF HAWAII FOUNDATION	1,000.	
SUBTOTALS	150,034.	
TOTAL TO SCHEDULE A, LINE 16		150,034.

SCHEDULE C	OTHER INCOME	STATEMENT	4
DESCRIPTION	AMOUNT		
DYSTELE & GODERICH	110,461.		
RANDOM HOUSE	162,789.		
COPYRIGHT CLEARANCE CENTER	489.		
TOTAL TO SCHEDULE C, LINE 6	273,739.		



SCHEDULE D	CAPITAL LOSS CARRYOVER	STATEMENT	5
1. ENTER THE AMOUNT FROM FORM 1040, LINE 41 . . . . .		350,226.	
2. ENTER THE LOSS FROM SCHEDULE D, LINE 21, AS A POSITIVE AMOUNT.		3,000.	
3. COMBINE LINES 1 AND 2. IF ZERO OR LESS, ENTER -0- . . . . .		353,226.	
4. ENTER THE SMALLER OF LINE 2 OR LINE 3 . . . . .		3,000.	
5. ENTER THE LOSS FROM SCHEDULE D, LINE 7, AS A POSITIVE AMOUNT .			
6. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 15 . . . . .			
7. ADD LINES 4 AND 6 . . . . .			
8. SHORT-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR. SUBTRACT LINE 7 FROM LINE 5. IF ZERO OR LESS, ENTER -0- . . .			
9. ENTER THE LOSS FROM SCHEDULE D, LINE 15, AS A POSITIVE AMOUNT.		115,516.	
10. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 7 . . . . .			
11. SUBTRACT LINE 5 FROM LINE 4. IF ZERO OR LESS, ENTER -0- . . . . .	3,000.		
12. ADD LINES 10 AND 11 . . . . .		3,000.	
13. LONG-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR. SUBTRACT LINE 12 FROM LINE 9. IF ZERO OR LESS, ENTER -0- . . .		112,516.	

SCHEDULE SE	NON-FARM INCOME	STATEMENT	6
DESCRIPTION		AMOUNT	
AUTHOR		258,772.	
TOTAL TO SCHEDULE SE, LINE 2		258,772.	

FORM 1116	EXPENSES DIRECTLY ALLOCABLE TO FOREIGN INCOME	STATEMENT	7
DESCRIPTION	COUNTRY	AMOUNT	
OTHER EXPENSES DIRECTLY ALLOCATED	OTHER COUNTRIES	7,702.	
TOTAL TO FORM 1116, PART I, LINE 2		7,702.	

FORM 6251

EXEMPTION WORKSHEET

STATEMENT

8

- 1 ENTER: \$50,600 IF SINGLE OR HEAD OF HOUSEHOLD; \$78,750 IF  
MARRIED FILING JOINTLY OR QUALIFYING WIDOW(ER); \$39,375  
IF MARRIED FILING SEPARATELY. . . . . 78,750.
- 2 ENTER YOUR ALTERNATIVE MINIMUM TAXABLE INCOME  
(AMTI) FORM 6251, LINE 28 . . . . . 413,531.
- 3 ENTER: \$112,500 IF SINGLE OR HEAD OF HOUSEHOLD;  
\$150,000 IF MARRIED FILING JOINTLY OR  
QUALIFYING WIDOW(ER); \$75,000 IF MARRIED  
FILING SEPARATELY . . . . . 150,000.
- 4 SUBTRACT LINE 3 FROM LINE 2. IF ZERO OR LESS . . . . .  
ENTER -0- . . . . . 263,531.
- 5 MULTIPLY LINE 4 BY 25% (.25). . . . . 65,883.
- 6 SUBTRACT LINE 5 FROM LINE 1. IF ZERO OR LESS, ENTER -0-. IF  
ANY OF THE THREE CONDITIONS UNDER CERTAIN CHILDREN UNDER  
AGE 24 APPLY TO YOU, COMPLETE LINES 7 THROUGH 10.  
OTHERWISE, STOP HERE AND ENTER THIS AMOUNT ON FORM 6251,  
LINE 29, AND GO TO FORM 6251, LINE 30 . . . . . 12,867.
- 7 MINIMUM EXEMPTION AMOUNT FOR CERTAIN CHILDREN UNDER AGE 24. .
- 8 ENTER YOUR EARNED INCOME, IF ANY. . . . .
- 9 ADD LINES 7 AND 8 . . . . .
- 10 ENTER THE SMALLER OF LINE 6 OR LINE 9 HERE AND ON FORM 6251,  
LINE 29, AND GO TO FORM 6251, LINE 30 . . . . .

## Step 1: Personal Information

BARACK H. OBAMA  
MICHELLE L. OBAMA  
1600 PENNSYLVANIA AVENUE NW  
WASHINGTON, DC 20500

## C Filing status (see instructions)

☐ Single or head of household ☒ Married filing jointly ☐ Married filing separately ☐ Widowed

D Check if same-sex civil union return (see instructions) ☐

		(Whole dollars only)	
Step 2: Income	1 Federal adjusted gross income from your U.S. 1040, Line 37; U.S. 1040A, Line 21; or U.S. 1040EZ, Line 4.	1	608,611 .00
	2 Federally tax-exempt interest and dividend income from your U.S. 1040 or 1040A, Line 8b; or U.S. 1040EZ.	2	.00
	3 Other additions. Attach Schedule M.	3	.00
	4 Total income. Add Lines 1 through 3.	4	608,611 .00

Step 3: Base Income	5 Social Security benefits and certain retirement plan income received if included in Line 1. Attach Page 1 of federal return.	5	.00
	6 Illinois Income Tax overpayment included in U.S. 1040, Line 10.	6	.00
	7 Other subtractions. Attach Schedule M. Check if Line 7 includes any amount from Schedule 1299-C. <input type="checkbox"/>	7	11,418 .00
	8 Add Lines 5, 6, and 7. This is the total of your subtractions.	8	11,418 .00
	9 Illinois base income. Subtract Line 8 from Line 4.	9	597,193 .00

Step 4: Exemptions	10 a Number of exemptions from your federal return. <u>4</u> x \$2,050	a	8,200 .00
	b If someone can claim you as a dependent, see instructions. <u>    </u> x \$2,050	b	.00
	c Check if 65 or older: <input type="checkbox"/> You + <input type="checkbox"/> Spouse = <u>    </u> x \$1,000	c	.00
	d Check if legally blind: <input type="checkbox"/> You + <input type="checkbox"/> Spouse = <u>    </u> x \$1,000	d	.00
	Exemption allowance. Add Lines a through d.	10	8,200 .00

Step 5: Net Income	11 Residents: Net income. Subtract Line 10 from Line 9. Skip Line 12.	11	588,993 .00
	12 Nonresidents and part-year residents: Check the box that applies to you during 2012 <input type="checkbox"/> Nonresident <input type="checkbox"/> Part-year resident, and write the Illinois base income from Sch. NR. Attach Sch. NR.	12	.00

Step 6: Tax	13 Residents: Multiply Line 11 by 5% (.05).	13	29,450 .00
	Nonresidents and part-year residents: Write the tax from Schedule NR.	14	.00
	14 Recapture of investment tax credits. Attach Schedule 4255.	14	.00
	15 Income tax. Add Lines 13 and 14. Cannot be less than zero.	15	29,450 .00

Step 7: Tax After Non- refundable Credits	16 Income tax paid to another state while an Illinois resident. Attach Schedule CR.	16	.00
	17 Property tax and K-12 education expense credit amount from Schedule ICR. Attach Schedule ICR.	17	.00
	18 Credit amount from Schedule 1299-C. Attach Schedule 1299-C.	18	.00
	19 Add Lines 16, 17, and 18. This is the total of your credits. Cannot exceed the tax amount on Line 15.	19	.00
	20 Tax after nonrefundable credits. Subtract Line 19 from Line 15.	20	29,450 .00

	21	Tax after nonrefundable credits from Page 1, Line 20.	21	29,450.00
<b>Step 8:</b>	22	Household employment tax. See instructions.	22	.00
<b>Other Taxes</b>	23	Use tax on Internet, mail order, or other out-of-state purchases from UT Worksheet or UT Table in the instructions. Do not leave blank.	23	0.00
	24	<b>Total Tax.</b> Add Lines 21, 22, and 23.	24	29,450.00
<b>Step 9:</b>	25	Illinois Income Tax withheld. Attach W-2 and 1099 forms.	25	18,942.00
<b>Payments</b>	26	Estimated payments from Forms IL-1040-ES and IL-505-I, including overpayment applied from 2011 return.	26	11,000.00
<b>and</b>	27	Pass-through entity tax payments. Attach Schedule K-1-P or K-1-T.	27	.00
<b>Refundable</b>	28	Earned Income Credit from Schedule ICR. Attach Schedule ICR.	28	.00
<b>Credit</b>	29	<b>Total payments and refundable credit.</b> Add Lines 25 through 28.	29	29,942.00
<b>Step 10:</b>	30	Overpayment. If Line 29 is greater than Line 24, subtract Line 24 from Line 29.	30	492.00
<b>Result</b>	31	Underpayment. If Line 24 is greater than Line 29, subtract Line 29 from Line 24.	31	.00
<b>Step 11:</b>	32	Late-payment penalty for underpayment of estimated tax.	32	.00
<b>Underpayment</b>	a	Check if at least two-thirds of your federal gross income is from farming.	<input type="checkbox"/>	
<b>of Estimated</b>	b	Check if you or your spouse are 65 or older and permanently living in a nursing home.	<input type="checkbox"/>	
<b>Tax Penalty</b>	c	Check if your income was not received evenly during the year and you annualized your income on Form IL-2210. Attach Form IL-2210.	<input checked="" type="checkbox"/>	
<b>and Donations</b>	d	Check if you were not required to file an Illinois Individual Income Tax return in the previous tax year.	<input type="checkbox"/>	
	33	Voluntary charitable donations. Attach Schedule G.	33	.00
	34	<b>Total penalty and donations.</b> Add Lines 32 and 33.	34	.00
<b>Step 12:</b>	35	If you have an overpayment on Line 30 and this amount is greater than Line 34, subtract Line 34 from Line 30. This is your remaining overpayment.	35	492.00
<b>Refund or</b>	36	Amount from Line 35 you want refunded to you. If you want to deposit your refund directly into your checking or savings account, complete the direct deposit information on Line 37.	36	0.00
<b>Amount You</b>	37	Complete to direct deposit your refund Routing number <input type="checkbox"/> Checking or <input type="checkbox"/> Savings Account number _____		
<b>Owe</b>	38	Subtract Line 36 from Line 35. This amount will be applied to your 2013 estimated tax.	38	492.00
	39	If you have an underpayment on Line 31, add Lines 31 and 34. <b>OR</b> If you have an overpayment on Line 30 and this amount is less than Line 34, subtract Line 30 from Line 34. This is the amount you owe.	39	.00

**Step 13:** Under penalties of perjury, I state that I have examined this return, and, to the best of my knowledge, it is true, correct, and complete.

Sign and Date: *[Signature]* 4/8/2013 Daytime phone number *Michelle Obama* 4/8/13  
Your signature Date Daytime phone number Your spouse's signature Date

*Michael Solheim* 4/3/13 Preparer's phone number Preparer's FEIN, SSN, or PTIN  
Paid preparer's signature Date Preparer's phone number Preparer's FEIN, SSN, or PTIN

**Third Party Designee** ☒ Check, and complete below, to allow another person to discuss this return with the Illinois Department of Revenue.

Designee's Name (please print) MICHAEL S SOLHEIM Designee's Phone number \_\_\_\_\_

**Form 1099-G Information** ☐ We no longer automatically mail 1099-G forms. Instead, we ask that you get this information from our website. Check the box if you still want us to mail you a paper Form 1099-G next year.

☐ If no payment enclosed, mail to:  
ILLINOIS DEPARTMENT OF REVENUE  
PO BOX 1040  
GALESBURG IL 61402-1040

☐ If payment enclosed, mail to:  
ILLINOIS DEPARTMENT OF REVENUE  
SPRINGFIELD IL 62726-0001

249002  
01-03-13

ID: 2BX

IL-1040 page 2 (R-12/12)

OR \_\_\_\_\_ AP \_\_\_\_\_ RR \_\_\_\_\_ DC \_\_\_\_\_

**2012 Schedule M Other Additions and Subtractions for Individuals**

Attach to your Form IL-1040

IL Attachment No. 15

**Read this information first**

Complete this schedule if you are required to add certain income on Form IL-1040, Line 3, or if you are entitled to take subtractions on Form IL-1040, Line 7.

**Note** If you are required to complete Schedule 1299-C, Schedule F, or Form IL-4562, you must do so before you complete this schedule.**Step 1: Provide the following information****BARACK H. & MICHELLE L. OBAMA**

Your name as shown on Form IL-1040.

Your Social Security number.

**Step 2: Figure your additions for Form IL-1040, Line 3**

Write the amount of

(Whole dollars only)

1	Your child's federally tax-exempt interest and dividend income as reported on U.S. Form 8814	1	.00
2	Distributive share of additions you received from a partnership, S corporation, trust, or estate. Attach Illinois Schedule K-1-P or Schedule K-1-T.	2	.00
3	Lloyds plan of operations loss, if reported on your behalf on Form IL-1023-C and included in your adjusted gross income	3	.00
4	Earnings distributed from IRC Section 529 college savings and tuition programs if not included in your adjusted gross income (Do not include distributions from "Bright Start," "Bright Directions," or "College Illinois" programs or programs that meet certain disclosure requirements - see instructions.)	4	.00
5	Illinois special depreciation addition amount from Form IL-4562, Step 2, Line 4. Attach Form IL-4562.	5	.00
6	Business expense recapture (nonresidents only)	6	.00
7	Recapture of deductions for contributions to Illinois college savings plans transferred to an out-of-state plan	7	.00
8	Credit taken on Schedule 1299-C for student assistance contributions you made as an employer	8	.00
9	Recapture of deductions for contributions to college savings plans withdrawn for nonqualified expenses or refunded	9	.00
10	Other income - Identify each item	10	.00
11	<b>Total Additions.</b> Add Lines 1 through 10. Write the amount here and on Form IL-1040, Line 3.	11	.00

**Step 3: Figure your subtractions for Form IL-1040, Line 7**

Write the amount of

12	Contributions made to the following college savings plans:	12a	.00
a	"Bright Start" College Savings Pool	12b	.00
b	"College Illinois" Prepaid Tuition Program	12c	.00
c	"Bright Directions" College Savings Pool		
13	Distributive share of subtractions from a partnership, S corporation, trust, or estate. (Do not include any amounts contained in Lines 20 or 22 of this schedule.) Attach Illinois Schedule K-1-P or K-1-T identifying you as the partner, shareholder, or beneficiary and listing your Social Security number.	13	.00
14	Restoration of amounts held under claim of right under Internal Revenue Code, Section 1341	14	.00
15	Contributions to a job training project	15	.00
16	Expenses related to federal credits or federally tax-exempt income	16	.00
17	Interest earned on investments through the Home Ownership Made Easy Program	17	.00
18	Illinois special depreciation subtraction amount from Form IL-4562, Step 3, Line 10. Attach Form IL-4562.	18	.00
19	Write the following only if included in Form IL-1040, Lines 1, 2, or 3: Military pay earned. Attach military W-2.	19	.00
20	U.S. Treasury bonds, bills, notes, savings bonds, and U.S. agency interest from U.S. 1040A or 1040. Attach a copy of U.S. 1040A or 1040, Schedule B, if required federally. <b>SEE STATEMENT 3</b>	20	11,418.00
21	August 1, 1969, valuation limitation amount from your Schedule F, Line 17. Attach Schedule F and required federal forms.	21	.00
22	Enterprise or river edge redevelopment zone and high impact business dividend subtraction amount from your Schedule 1299-C, Step 2, Line 10. Attach Schedule 1299-C.	22	.00
23	<b>Add Lines 12a through 22 and write the amount here and on Page 2, Line 24.</b>	23	11,418.00

**Step 3: Continued**

24	Write the amount from Page 1, Line 23.	24	11,418.00
25	Recovery of items previously deducted on U.S. 1040, Schedule A (including refunds of any state and local income taxes, other than Illinois). Attach a copy of U.S. 1040, Page 1, and required federal forms.	25	.00
26	Ridesharing money and other benefits	26	.00
27	Payment of life insurance, endowment, or annuity benefits received	27	.00
28	Lloyds plan of operations income if reported on your behalf on Form IL-1023-C	28	.00
29	Income earned by certain trust accounts established under the Illinois Pre-Need Cemetery Sales Act	29	.00
30	Education loan repayments made for primary care physicians who agree to practice in designated shortage areas under the Family Practice Residency Act	30	.00
31	Reparations or other amounts received as a victim of persecution by Nazi Germany	31	.00
32	Interest on the following tax-exempt obligations of Illinois state and local government. Do not include interest you received indirectly through owning shares in a mutual fund.		
a	Illinois Housing Development Authority bonds and notes (except housing-related commercial facilities bonds and notes)	32a	.00
b	Export Development Act of 1983 bonds	32b	.00
c	Illinois Development Finance Authority bonds, notes, and other obligations (venture fund and infrastructure bonds only)	32c	.00
d	Quad Cities Regional Economic Development Authority bonds and notes (if declared to be exempt from taxation by the Authority)	32d	.00
e	College Savings bonds	32e	.00
f	Illinois Sports Facilities Authority bonds	32f	.00
g	Higher Education Student Assistance Act bonds	32g	.00
h	Illinois Development Finance Authority bonds issued under the Illinois Development Finance Authority Act, Sections 7.80 through 7.87	32h	.00
i	Rural Bond Bank Act bonds and notes	32i	.00
j	Illinois Development Finance Authority bonds issued under the Asbestos Abatement Finance Act	32j	.00
k	Quad Cities Interstate Metropolitan Authority bonds	32k	.00
l	Southwestern Illinois Development Authority bonds	32l	.00
m	Illinois Finance Authority bonds issued under the Illinois Finance Authority Act, Sections 820.60 and 825.55 or the Asbestos Abatement Finance Act	32m	.00
n	Illinois Power Agency bonds issued by the Illinois Finance Authority	32n	.00
o	Central Illinois Economic Development Authority bonds	32o	.00
p	Eastern Illinois Economic Development Authority bonds	32p	.00
q	Southeastern Illinois Economic Development Authority bonds	32q	.00
r	Southern Illinois Economic Development Authority bonds	32r	.00
s	Illinois Urban Development Authority bonds	32s	.00
t	Downstate Illinois Sports Facilities Authority bonds	32t	.00
u	Western Illinois Economic Development Authority bonds	32u	.00
v	Upper Illinois River Valley Development Authority Act bonds	32v	.00
w	Will-Kankakee Regional Development Authority bonds	32w	.00
33	Interest on the following non-U.S. government bonds.		
a	Bonds issued by the government of Guam	33a	.00
b	Bonds issued by the government of Puerto Rico	33b	.00
c	Bonds issued by the government of the Virgin Islands	33c	.00
d	Bonds issued by the government of American Samoa	33d	.00
e	Bonds issued by the government of the Northern Mariana Islands	33e	.00
f	Mutual mortgage insurance fund bonds	33f	.00
34	Amount of your child's interest from U.S. Treasury and U.S. agency obligations or from sources in Line 20, 32 or 33 as reported on U.S. Form 8814	34	.00
35	Railroad sick pay and unemployment income. Attach Form 1099-G and a copy of your federal return.	35	.00
36	Unjust imprisonment compensation awarded by Illinois Court of Claims	36	.00
37	Distributions from "Bright Start," "College Illinois," and "Bright Directions" college savings plans if included in Line 1 because you claimed a federal American Opportunity or Lifetime Learning Credit	37	.00
38	<b>Total Subtractions.</b> Add Lines 24 through 37. Write the amount here and on Form IL-1040, Line 7.	38	11,418.00

**2012 IL-2210** Computation of Penalties for Individuals

Attach to your Form IL-1040

IL Attachment No. 19

**Read this information first-**

We encourage you to let us figure your penalties and send you a bill instead of completing this form yourself. We will waive the late payment penalty for underpayment of estimated tax if you timely paid the lesser of 100 percent of the prior year's tax liability or 90 percent of the current year's tax liability. If you elect to complete Form IL-2210, this form reflects that waiver. For original returns only. Do not use this form if you are filing Form IL-1040-X, Amended Individual Income Tax Return, after the extended due date of the return.

**Step 1: Provide the following information**

BARACK H. &amp; MICHELLE L. OBAMA

Your name as shown on Form IL-1040

Your Social Security number

Note: If your prior year tax return was filed using a different Social Security number than the number above, write that number here.

**Step 2: Figure your required installments**

	A This year	B Last year
1 Write the amount of your total income tax from each tax return. See instructions.	1 29,450.	38,553.
2 Write the amount of credits from each tax return. See instructions.	2	
3 Subtract Line 2 from Line 1.	3 29,450.	38,553.
4a Write the total amount of this year's Illinois withholding from your W-2 forms.	4a 18,942.	
4b Write the total amount of any pass-through entity payments made on your behalf.	4b	
4c Add Lines 4a and 4b and write the result here.	4c 18,942.	
5 Subtract Line 4c from Line 3.	5 10,508.	
6 Multiply Column A, Line 3, by 90% (.9).	6 26,505.	
7 If Line 5 is \$500 or less or if you are not required to make estimated tax payments, write "0," and go to Step 3. Otherwise, write the lesser of Column A, Line 6, or Column B, Line 3.	7 26,505.	
8 Divide the amount written on Line 7 by four. This is the amount of each required installment. (If you use the annualized income installment method, see instructions.)	8 6,626.	

  

	Quarter 1 15th day of 4th month of tax year	Quarter 2 15th day of 6th month of tax year	Quarter 3 15th day of 9th month of tax year	Quarter 4 15th day of 1st mo. after end of tax year
9a Write the installment due date for each quarter. See instructions.		06/15/12	09/17/12	01/15/13
9b Write the required installment. See instructions.	4,584.	7,436.	6,484.	8,001.
10a Write any credit carried forward from the prior year.		Skip this line for Quarter 2.	Skip this line for Quarter 3.	Skip this line for Quarter 4.
10b Write the amount of tax withheld.	4,736.	4,736.	4,736.	4,734.
10c Write the amount of pass-through payments.				
10d Add Lines 10a through 10c in each column.	4,736.	4,736.	4,736.	4,734.
11 Subtract Line 10d from Line 9b. If the amount is negative, use brackets.	<152.>	2,700.	1,748.	3,267.
12 If the amount on Line 13 of the previous quarter is negative, write that amount as a positive here. Otherwise, write "0."	Skip this line for Quarter 1.	152.	0.	0.
13 Subtract Line 12 from Line 11. If the amount is negative, use brackets.	<152.>	2,548.	1,748.	3,267.

Continue with Step 3 on Page 2 →

### Step 3: Figure your unpaid tax

- 14 Write the amount from Column A, Line 3. 14 29,450.
- 15 Write the amount of household employment tax from IL 1040, Line 22. 15
- 16 Write the amount of use tax from IL 1040, Line 23. 16
- 17 Add Lines 14 through 16. Write the total amount here. 17 29,450.
- 18 Write the total amount of all payments made on or before the original due date of your tax return. Include any credit carried forward from the prior year, your total estimated payments made this year, Form IL-505-1 payments, the pass-through entity payments made on your behalf, and your withholding as shown on your W-2 forms. Compare that total to the total of Line 9b, Quarters 1 through 4, and write the greater amount here. 18 29,942.
- 19 Subtract Line 18 from Line 17. If the amount is
- positive, write that amount here. Write this amount in Penalty Worksheet 2, Line 23, Column C and continue to Step 4.
  - zero or negative, write that amount here and, if negative, use brackets.
- 19 <492.>

### Step 4: Figure your late-payment penalty

Use Penalty Worksheet 1 to figure your late-payment penalty for underpayment of estimated tax.  
Use Penalty Worksheet 2 to figure your late-payment penalty for unpaid tax.

**Note** You must follow the instructions in order to properly complete the penalty worksheets.

- 20 Write the amount and the date of each payment you made. See instructions.

Amount	Date paid	Amount	Date paid	Amount	Date paid
a 3,000.	06/15/12	e		i	
b 3,000.	09/17/12	f		j	
c 5,000.	12/28/12	g		k	
d		h		l	

#### Penalty rates

Number of days late	Penalty rate
1 - 30	.02
31 or more	.10

### Penalty Worksheet 1 - Late-payment penalty for underpayment of estimated tax

**Note** If you paid the required amount from Line 13 by the payment due date for each quarter, do not complete this worksheet.

- 21 Write the unpaid amounts from Line 13, Quarters 1 through 4, on the first line of the appropriate quarters in Column C below.

A Period	B Due date	C Unpaid amount	D Payment applied	E Balance due (Col. C - Col. D)	F Payment date	G Number of days late	H Penalty rate (See above)	I Penalty
Qtr 1								
Qtr 2	06/15/12	2,548.		2,548.	06/15/12			
		2,548.	3,000.	-452.	06/15/12			
Qtr 3	09/17/12	1,748.		1,748.	09/17/12			
		1,748.	452.	1,296.	09/17/12			
		1,296.	3,000.	-1,704.	09/17/12			
Qtr 4	01/15/13	3,267.		3,267.	01/15/13			
		3,267.	1,704.	1,563.	01/15/13			
		1,563.	5,000.	-3,437.	01/15/13			

- 22 Add Column I, Quarters 1 through 4. This is your late-payment penalty for underpayment of estimated tax.

Write the total amount here and on your Form IL 1040, Line 32 (round to whole dollars).

22 0

**Note** You may apply any remaining overpayment from Quarter 4, Column E above to any underpayment when figuring Penalty Worksheet 2, only if the payment date in Column F is after the original due date of the return.



## Penalty Worksheet 2 - Late-payment penalty for unpaid tax

23 Write any positive amount from Line 19 on the first line of Column C below.

A Return	B Due date	C Unpaid amount	D Payment applied	E Balance due (Col. C - Col. D)	F Payment date	G Number of days late	H Penalty rate (See above)	I Penalty

24 Add Column I. This is your late-payment penalty for unpaid tax.

Write the total amount here and on Line 33.

24 \_\_\_\_\_

## Step 5: Figure your late-filing penalty and the amount you owe

**Note** Figure your late-filing penalty only if

- you are filing your tax return after your extended due date, and
- your tax was not paid on or before your original due date.

### Figure your late-filing penalty.

25 Write the amount from Form IL-1040, Line 15.	25	_____
26 Write the amount of household employment tax from Form IL-1040, Line 22.	26	_____
27 Write the amount of use tax from Form IL-1040, Line 23.	27	_____
28 Add Lines 25 through 27. Write the total amount here.	28	_____
29 Write the total amount of credits and payments made on or before your original due date.	29	_____
30 Subtract Line 29 from Line 28.	30	_____
31 Multiply the amount on Line 30 by 2% (.02).	31	_____
32 Write the lesser of Line 31 or \$250. This is your late-filing penalty.	32	_____

### Figure the amount you owe.

33 Write any late-payment penalty for unpaid tax from Line 24.	33	_____
34 Write any late-filing penalty from Line 32.	34	_____
35 If you have an overpayment on Form IL-1040, Line 35, write that amount as a <negative number>. If you have an amount due on Form IL-1040, Line 39, write that amount as a positive number.	35	_____
36 Add Lines 33 through 35. If the result is a negative number, this is the amount you are overpaid (before any amount applied to next year's estimated tax). If the result is a positive number, this is the amount you owe. See Form IL-1040, Line 39, instructions for your payment options.	36	_____

Continue to Step 6 on Page 4, if annualizing your income. →

## Step 6: Complete the annualization worksheet for Step 2, Line 9b

Complete this worksheet **only** if your income was not received evenly throughout the year and you choose to annualize your income. Complete Lines 37 through 53 of one column before going to the next, beginning with Column A.

	A	B	C	D
	First 3 months	First 5 months	First 8 months	All 12 months
37 Write your Illinois base income for each period. See instructions.	37 103,927.	226,008.	370,990.	597,193.
38 Annualization factors.	38 4	2.4	1.5	1
39 Multiply Line 37 by Line 38. This is your annualized income.	39 415,708.	542,419.	556,485.	597,193.
40 Exemptions. See instructions.	40 8,200.	8,200.	8,200.	8,200.
41 Subtract Line 40 from Line 39. This is your Illinois net income.	41 407,508.	534,219.	548,285.	588,993.
42 Multiply Line 41 by 5% (.05).	42 20,375.	26,711.	27,414.	29,450.
43 For each period, write the amount you wrote on Step 2, Line 2, Column A.	43			
44 Subtract Line 43 from Line 42.	44 20,375.	26,711.	27,414.	29,450.
45 Applicable percentage.	45 22.5% (.225)	45% (.450)	67.5% (.675)	90% (.900)
46 Multiply Line 44 by Line 45. This is your annualized installment.	46 4,584.	12,020.	18,504.	26,505.
47 Add the amounts on Line 53 of each of the preceding columns and write the total here.	47 Skip this line for Column A.	4,584.	12,020.	18,504.
48 Subtract Line 47 from Line 46. If less than zero, write "0."	48 4,584.	7,436.	6,484.	8,001.
49 Write the amount you would have entered in Step 2, Line 9b, if you were not annualizing.	49 6,626.	6,626.	6,626.	6,627.
50 Write the amount from Line 52 of the preceding column.	50 Skip this line for Column A.	2,042.	1,232.	1,374.
51 Add Lines 49 and 50.	51 6,626.	8,668.	7,858.	8,001.
52 If Line 51 is greater than Line 48, subtract Line 48 from Line 51. Otherwise, write "0."	52 2,042.	1,232.	1,374.	Skip this line for Column D.
53 Write the lesser of Line 48 or Line 51 here and on Step 2, Line 9b. This is your required installment.	53 4,584.	7,436.	6,484.	8,001.

BARACK H. & MICHELLE L. OBAMA

IL-SCHEDULE M	U.S. GOVERNMENT OBLIGATIONS	STATEMENT	3
---------------	-----------------------------	-----------	---

DESCRIPTION	AMOUNT
BOND PREMIUM AMORTIZATION	-3,508.00
NORTHERN TRUST SECURITIES US GOVT INTEREST	16,348.00
NORTHERN TRUST SECURITIES US GOVT INTEREST PAID	-1,422.00
TOTAL TO FORM IL-SCHEDULE M, LINE 20	11,418.00

## SCHEDULE B

(Form 1040A or 1040)

Department of the Treasury

Internal Revenue Service

Name(s) shown on return

## Interest and Ordinary Dividends

▶ Attach to Form 1040A or 1040.

(99) ▶ Information about Schedule B (Form 1040A or 1040) and its instructions is at [www.irs.gov/form1040](http://www.irs.gov/form1040).

OMB No. 1545-0074

2012

Attachment  
Sequence No. 08

Your social security number

BARACK H. &amp; MICHELLE L. OBAMA

Part I  
Interest

- 1 List name of payer, if any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see instructions and list this interest first. Also, show that buyer's social security number and address ▶

BOND PREMIUM AMORTIZATION

JP MORGAN

NORTHERN TRUST SECURITIES US GOVT INTEREST

NORTHERN TRUST SECURITIES US GOVT INTEREST PAID

Amount

-3,508.

44.

16,348.

-1,422.

Note. If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

- 2 Add the amounts on line 1
- 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815

- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶

Note. If line 4 is over \$1,500, you must complete Part III.

Amount

11,462.

11,462.

Part II  
Ordinary Dividends

- 5 List name of payer ▶

NORTHERN TRUST SECURITIES

2.

Note. If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

- 6 Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶

Note. If line 6 is over \$1,500, you must complete Part III.

2.

Part III  
Foreign Accounts and Trusts

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a At any time during 2012, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions
- If "Yes," are you required to file Form TD F 90-22.1 to report that financial interest or signature authority? See Form TD F 90-22.1 and its instructions for filing requirements and exceptions to those requirements

- b If you are required to file Form TD F 90-22.1, enter the name of the foreign country where the financial account is located ▶

- 8 During 2012, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

If "Yes," you may have to file Form 3520. See instructions

Yes No

X

X

227501  
09-25-12

LHA For Paperwork Reduction Act Notice, see separate instructions.

Schedule B (Form 1040A or 1040) 2012

## Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

2012

Attachment  
Sequence No. 12A

▶ Information about Form 8949 and its separate instructions is at [www.irs.gov/form8949](http://www.irs.gov/form8949).  
▶ File with your Schedule D to list your transactions for lines 1, 2, 3, 8, 9, and 10 of Schedule D.

Name(s) shown on return

Social security number or  
taxpayer identification no.

BARACK H. & MICHELLE L. OBAMA

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

<b>Part I</b>	<b>Short-Term.</b> Transactions involving capital assets you held one year or less are short-term. For long-term transactions, see page 2.
---------------	--

**You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.**

- ☐ (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS
- ☒ (B) Short-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS
- ☐ (C) Short-term transactions not reported to you on Form 1099-B

[illegible]

**Note.** If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

